

Quick Reference: Referrals

What type of phone call is being made or received?

TYPE OF COMMUNICATION	Outreach Call if this is an outbound call being made for the purpose of a referral. <ul style="list-style-type: none"> Outreach Call – Answered should be used if a referral call is answered. Outreach Call – Left Voicemail should be used if a referral call is made but not answered, and a voicemail has been left. 	EXAMPLE	Calling a contact to let them know about a vaccine event.
	Monitoring Call if this is a referral made as part of a standard initial or daily monitoring call (inbound or outbound).	EXAMPLE	Contact notes a resource need during initial assessment conversation, and you refer them to support.
	Incoming Request if this is an inbound call from a contact or case being made for the purpose of receiving a referral.	EXAMPLE	Contact calls seeking information about food assistance.

What was the context of the referral?

TYPE OF CAMPAIGN	Awareness if you are providing general support information that is not connected to a specific event or request. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Providing education to a contact about vaccine availability in their area.
	Specific Event if you are providing this individual with information about an upcoming event. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Calling a contact to let them know about an upcoming vaccination event in their area.
	Specific Request if this individual requests information about a specific need. <i>(Typically a Monitoring Call or an Incoming Request.)</i>	EXAMPLE	On a monitoring call, a contact lets you know they need assistance with housing.

What type of referral is being made?

VACCINE		RESOURCE		OTHER	
KIND OF REFERRAL?	REFERRAL TYPE	Vaccine if the referral is for vaccination support. <i>This referral should be logged for all contacts and case patients who have not already been referred.</i>	REFERRAL TYPE	Resource if the referral is for another resource need, such as food assistance, legal help, or transportation. <i>This referral should be logged if the contact responds “Yes” to resource need inquiries.</i>	Other if the referral cannot be captured by “Vaccine” or any of the categories listed in “Resource.”
	OUTCOME OF REFERRAL	<ul style="list-style-type: none"> Vaccine scheduled Already vaccinated Does not meet criteria for vaccine Does not want vaccine Transferred to LHD or vaccine hotline General information provided Other <i>(will produce a free text field)</i> 	REFERRAL NEED	Use this multi-select field to select one or more descriptors for this resource need. <i>(Selecting “Other” will produce Referral Need – Other, a free text field to gather more information.)</i>	Use the free-text field to add more information about this referral.
OUTCOME OF THE REFERRAL?	OUTCOME OF REFERRAL	<ul style="list-style-type: none"> Confirmed needs met Connected with CHW (if applicable) Pending Action <i>(if the outcome of this referral is yet to be confirmed)</i> Resource Not Available <i>(if the resource needs are unable to be met)</i> Other <i>(will produce a free text field)</i> 	OUTCOME OF REFERRAL	<ul style="list-style-type: none"> Confirmed needs met Connected with CHW (if applicable) Pending Action <i>(if the outcome of this referral is yet to be confirmed)</i> Resource Not Available <i>(if the resource needs are unable to be met)</i> Other <i>(will produce a free text field)</i> 	
			AGENCY	The organization to which you have referred this individual: <ul style="list-style-type: none"> 211 CHW Local resource Other <i>(will produce a free text field)</i> 	
			AGENT NAME	Free text field for the name of the person to whom you referred this individual.	
OUTCOME OF THE REFERRAL?	OUTCOME OF REFERRAL	The process used for this referral: <ul style="list-style-type: none"> Transferred to person (warm transfer) Transferred to phone number (cold transfer) Provided contact information (no transfer) Other <i>(will produce a free text field)</i> 	HOW REFERRED	The process used for this referral: <ul style="list-style-type: none"> Transferred to person (warm transfer) Transferred to phone number (cold transfer) Provided contact information (no transfer) Other <i>(will produce a free text field)</i> 	
			NOTES FROM REFERRAL	Required free text field for you to provide information.	

DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and a referral record!